KeyedIn Enterprise
V8.01 Release

Release Guide

Version 8.01

December 2023

Contents

Document Management

Version Control

Version Number	Date	Revision Description/Summary of Change	Section	Prepared By	Next Review Date
1.0	26/10/2023	All	All	J Atherton	
1.1	1/12/2023	All	All	T Raper	

Document Approval

Version Number	Approval Date	Approved By (Name/Title)
1.1	1/12/2023	Tom Raper – Product Manager

Document Authorization

Version Number		
1.1	04/12/2023	Terry Willans – Director, Global Security

Overview of Service Changes

	Fixes	Enhancement
Web Application	✓	✓
Mobile Application	✗	✗
Mobile Services	✗	✗
V3 API	✗	✗
V7 Core API	✗	✗
V7 Data API	✗	✗
Enterprise Core API	✓	✗
Enterprise Data API	✓	✗
Enterprise Planning API	✓	✓
Enterprise Time/Expense API	✗	✗
Data Views	✗	✓

Release Summary

KeyedIn Enterprise's v8.01, is a scheduled maintenance update release with general support fixes and the addition of Task-to-Task Inter-Project Dependencies, a new function on Project widgets and reports, and dataviews supporting the enhanced forecasting functionality added in version 8.0.

Highlights of New Features and Improvements

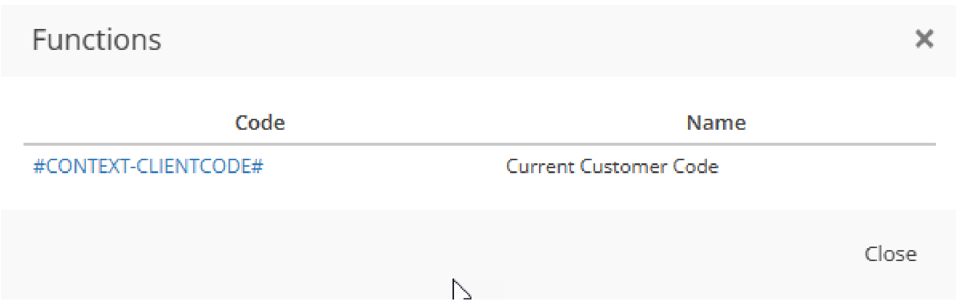
Task-to-Task Inter-Project Dependencies

A new option can be enabled to create dependencies between tasks in separate Level 1 Task Plans. This is to allow related projects or workstreams on a single Work Item to capture and understand the dependencies between tasks or outputs from each related work stream.

This new functionality does not replace the former dependency operations available on the Milestone/Deliverable record and it is still recommended to create dependencies at higher-level milestone where applicable and for customers needing to see relationships between projects at a milestone level.

New Function #CONTEXT-CLIENTCODE#

A new function is available on widgets or reports associated to project records allowing report to filter records by the Customer (Client) code defined on the project. This allows users to create a report that may show other related records that are also associated to the Customer (Client) on the currently viewed project (e.g., related Projects).



Task-to-Task Inter-Project Dependencies

Feature Setup

Task-to-Task Inter-Project Dependencies must first be enabled via Configuration > Planning Settings.

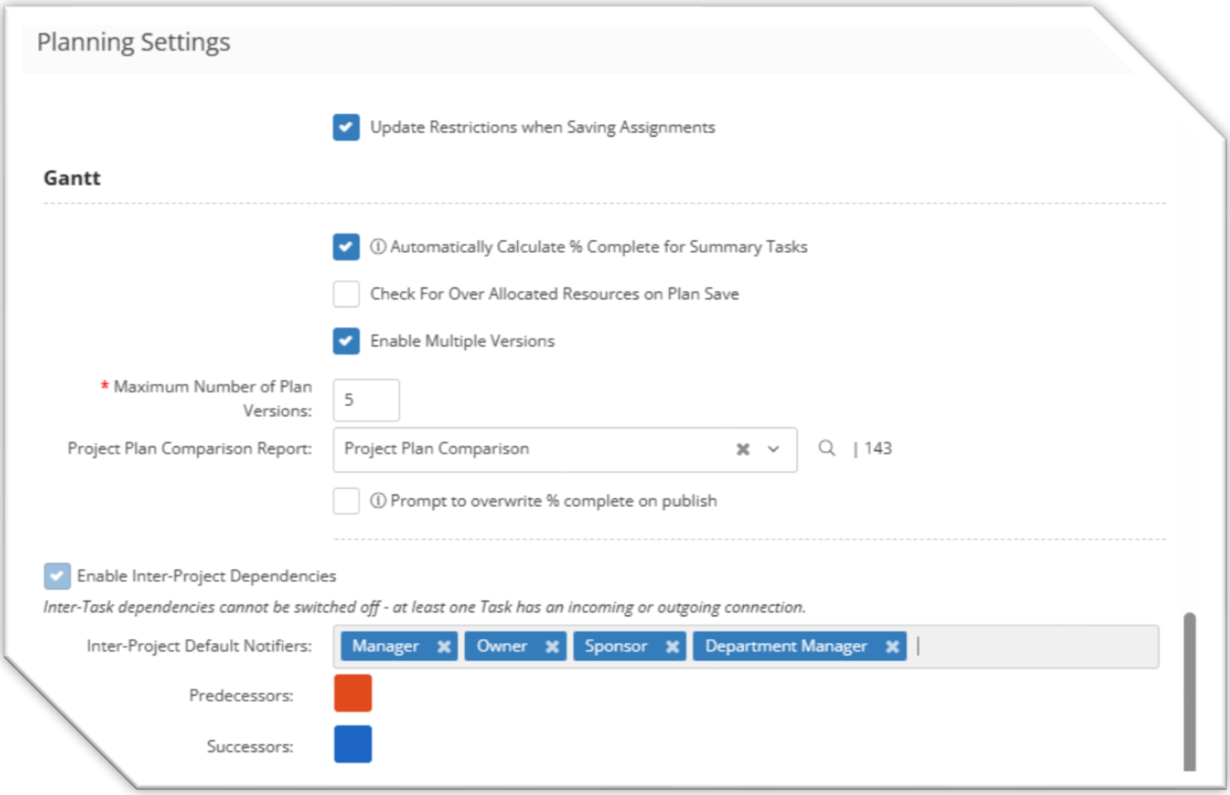


Figure 1: Configuration | Planning Settings

Once enabled any project may establish task-to-task inter-project dependencies. If any projects have inter-project dependencies in place, the option within Planning Settings cannot be disabled. If no task-to-task inter-project dependencies exist, the option can be disabled.

Inter-Project Default Notifiers – Allow you to select four token users on the specific record #Manger, #Owner, #Sponsor, and #Department (*Team*) Manager or specific named resources. As dependencies are established across projects these users will receive notifications and can approve or reject the dependency (described later).

Predecessor – This colour selection is used to determine how predecessor tasks will be highlighted on the task plan. Explained further in Feature Usage section.

Successors - This colour selection is used to determine how successor tasks will be highlighted on the task plan. Explained further in Feature Usage section.

Login Group Notifications

Task-to-task inter-project dependencies leverage dialog boxes when opening the task plan for impacted projects. In addition, administrators may want to enable system notifications and email notifications for dependencies using a new system notification option "***Notify selected Resource when a Project Task Plan has had an Inter-Project dependency amendment.***" The option can be added to the desired Login Groups from the standard Notifications tab.

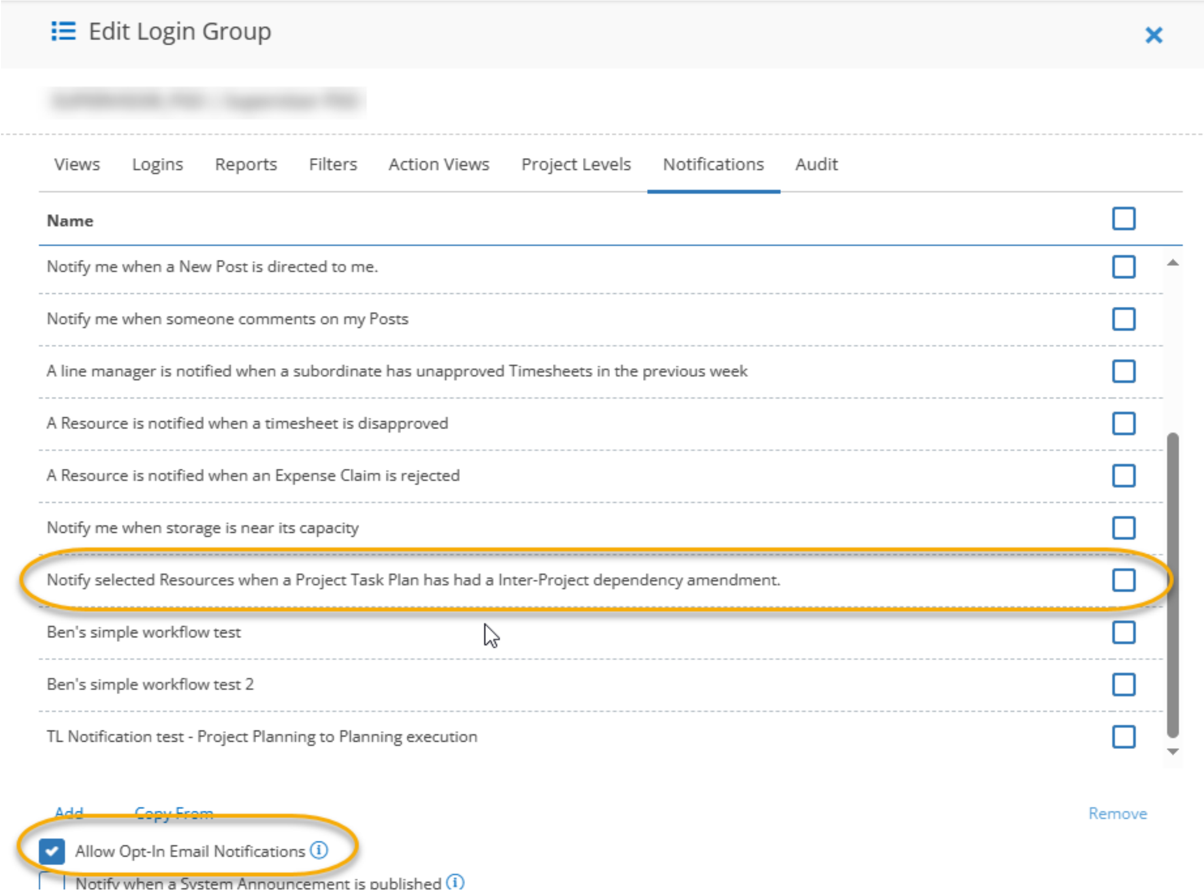


Figure 2: Login Group Notifications tab

Individual Project Configuration

Each project you wish create task-to-task inter-project dependencies on, must be configurated to allow the feature before task dependencies can be established. For a project where you want to enable task-to-task inter-project dependencies, select Open on that Project, then into the Configuration cog.

Figure 3: Edit Project header.

Then on the Planning Settings tab, select Enable Inter-Project Dependencies. Before you can connect to another project, the other project must also have Inter-Project Dependencies enabled.

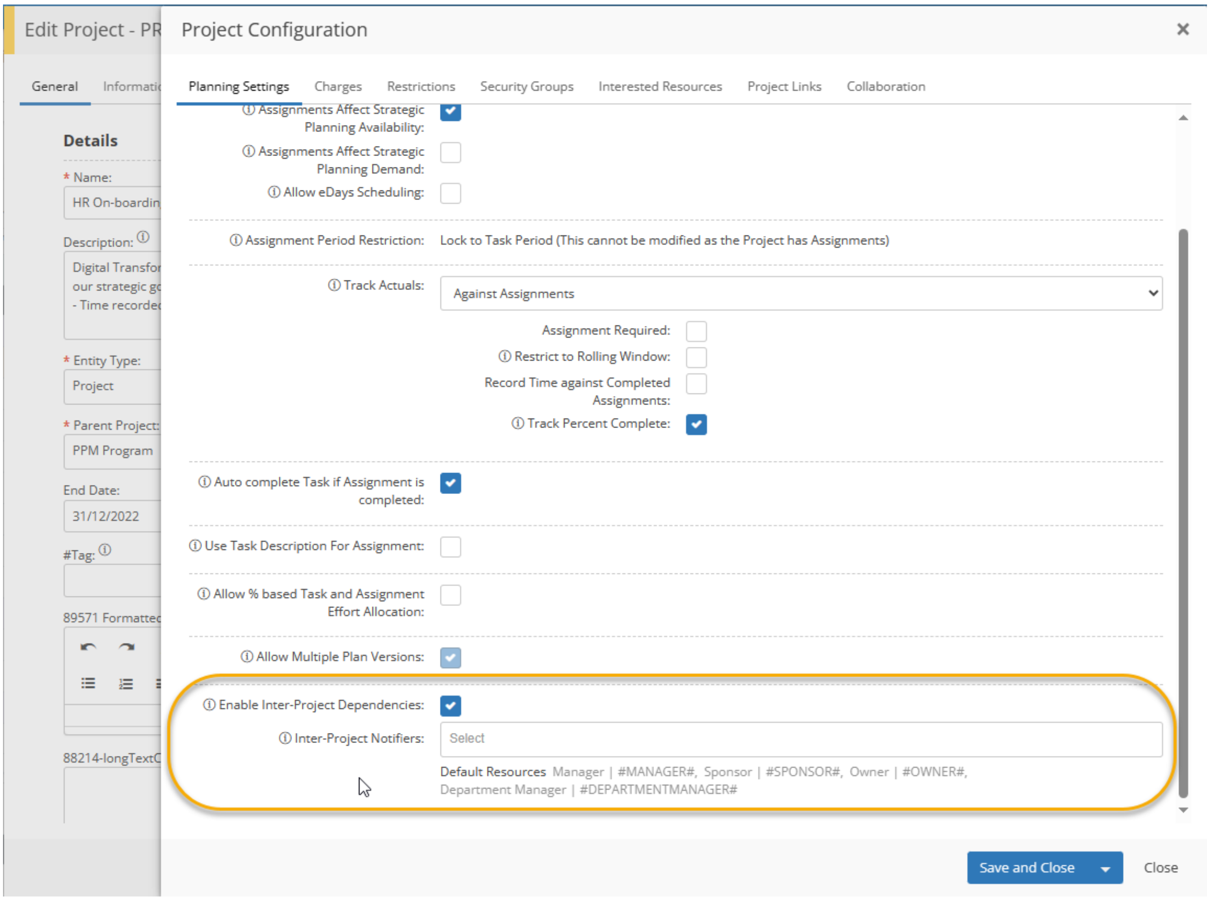


Figure 4: Project Configuration options.

Inter-Project Notifiers – If you wish to override the system defined default resources, you may select alternate token (e.g., #Manager) or select specific resources included in system notifications.

Feature Usage

Establishing a relationship between two tasks will still be based on the current operation of selecting the Predecessor task.

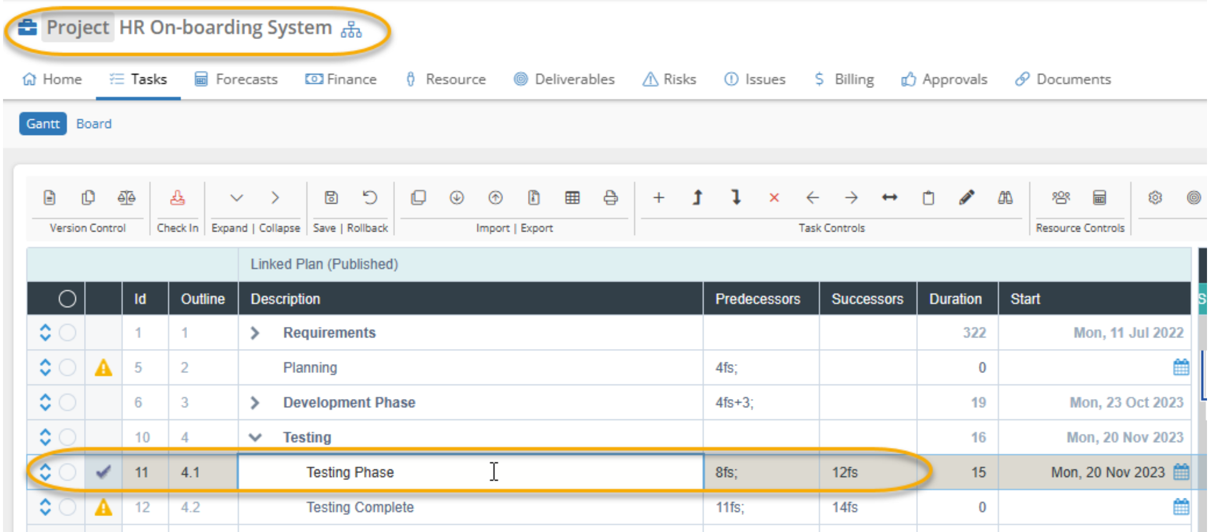


Figure 5: Source Project before defining a dependency predecessor on Testing Phase task.

To create an inter-project predecessor, double-click the task line on the Gantt to open the Task profile page.

Then select the Predecessors tab:

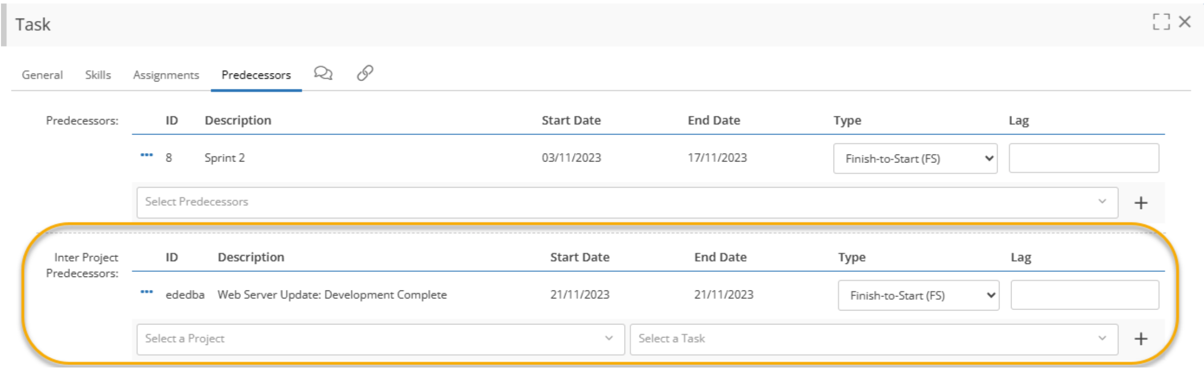


Figure 6: Defined predecessor between projects.

The '***Select a Project***' option will display all projects that have Inter-Project Dependencies enabled.

Note – You will only be able to add a Task-to-Task Inter-Project Dependency if you have view permissions to see that project via your Login Profile.

Once the Project and Task have been selected, the '+' icon will add the selection. The task plan must be saved before the other plan and notifiers are notified that you want to create an Inter-Project Dependency.

Note – Predecessors will always be shown at the top of the plan (red is this example) and Successors will always be shown at the bottom of the plan (blue is this example). Both will be highlighted in the colours selected via Config > Planning Settings.

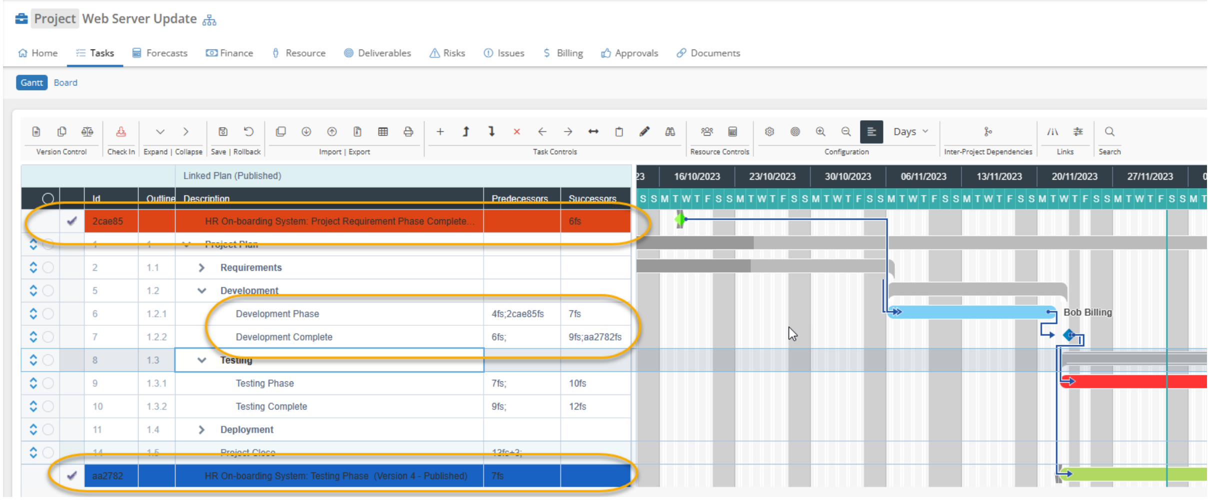


Figure 7: View of project plan when it has predecessors and successors to other plans.

When a connection is made the Project Manager for the other plan will be notified upon opening the task pane for the project, via a system notification and possible email alert (if enabled for the specific notification). Users must make one of three choices (Accept, Reject, or Hold Changes).

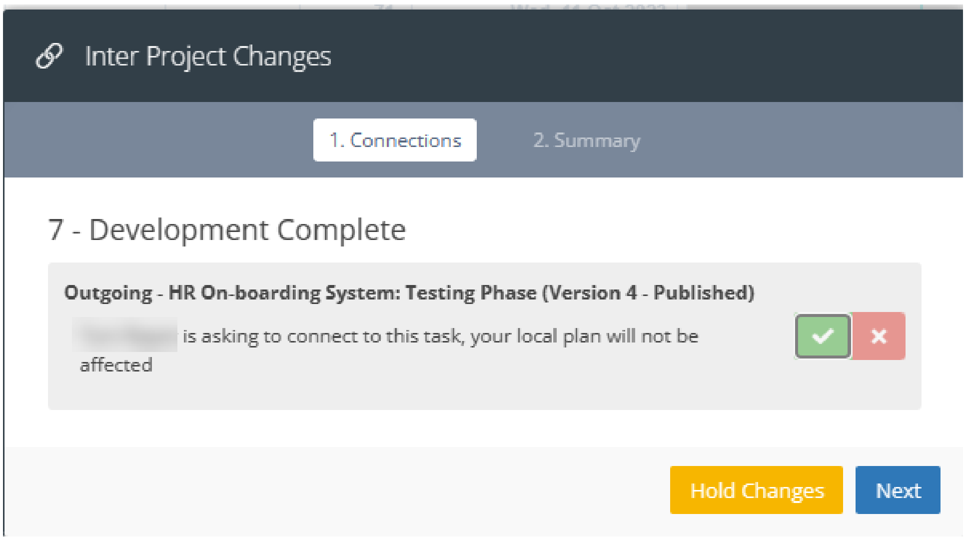


Figure 8: Notification opening a plan that has a new connection established.

Accept Changes (Green Check Mark) - Will confirm the connection and the predecessor will be added to the plan. First select the Accept option and then click next to continue. The summary screen will inform users of any impact to tasks based on the accepted dependencies.

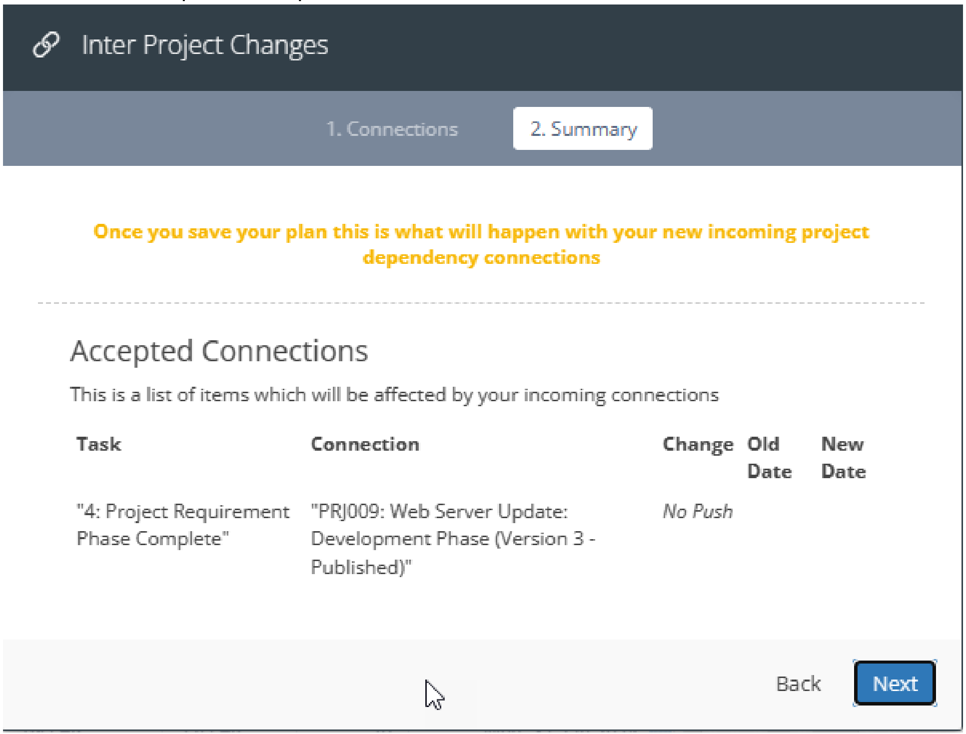


Figure 9: Sample summary of impact of accepted changes.

Decline Changes (Red X) – Will reject the desired dependency and send notification to the prescribed notifiers.

Hold Changes - Will allow the user to continue to the plan and decide at a later moment whether to accept the connections. If as user selects Hold Changes, the Summary provides reference to the pending changes and further changes to the project will not be allowed until either accepted or declined. This offers the ability for the impact of the dependency to be evaluated before accepting or declining.

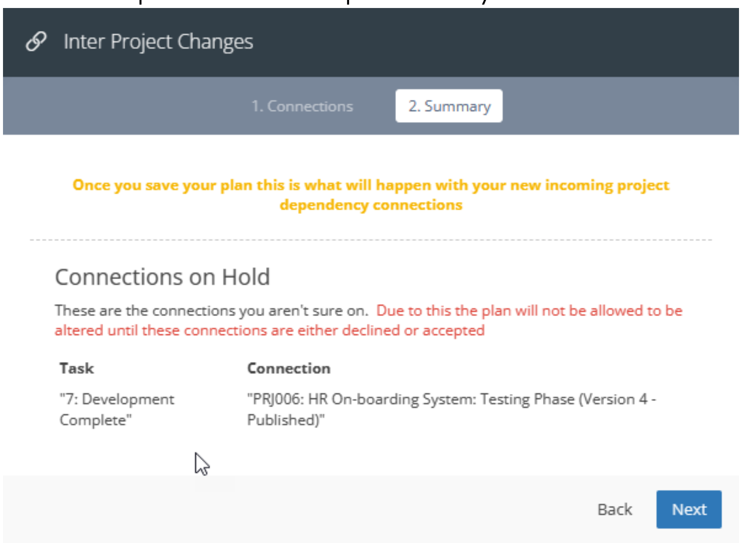


Figure 10: Sample summary when electing to Hold Changes

Next – Users must select to either Accept, Decline, or Hold changes before opening the plan. Once a selection has been made users will be able to click next and proceed to the project task plan.

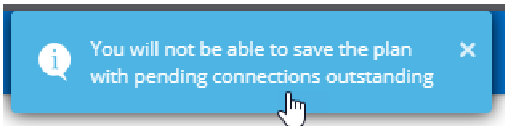


Figure 11: Message after uses elect to Hold Changes.

If a user elects to Hold Changes they may proceed to view the plan but cannot make changes and save the plan until the pending dependencies are accepted or declined.

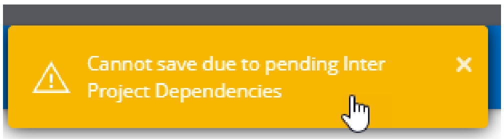


Figure 12: Message when trying to save project whilst dependencies are on hold.

Pending Changes on Hold - Any Pending connections can be accessed using the Inter Project Dependencies option on the Gantt toolbar when opening the plan.

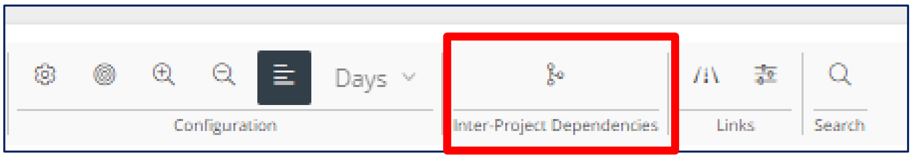


Figure 13: Task toolbar Dependencies option when enabled on the project.

Removing a Dependency – Users may wish to remove a previously accepted task-to-task inter-project dependency. This action can be performed from the Predecessor tab of the task where it was originally defined. From the ellipsis record menu (three dots) choose the Delete option.

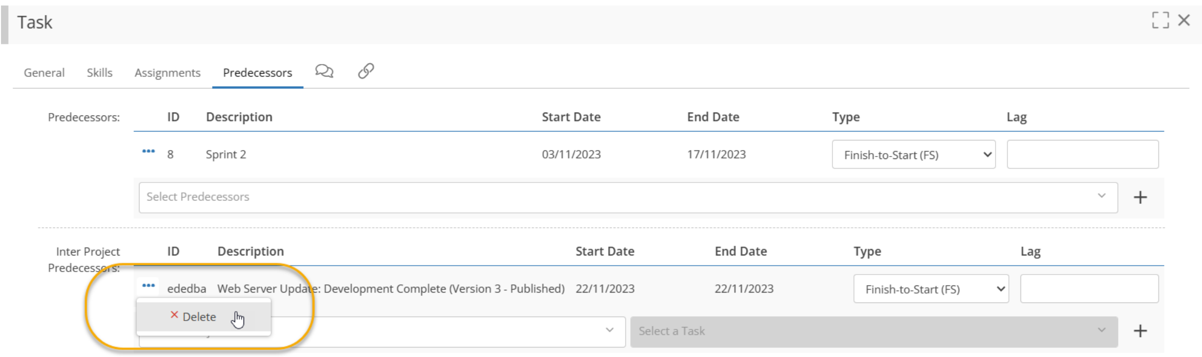


Figure 14: Option to delete a previously accepted dependency.

After a dependency has been removed the manger or user opening the predecessor project will receive a notification highlighting the removed dependency.

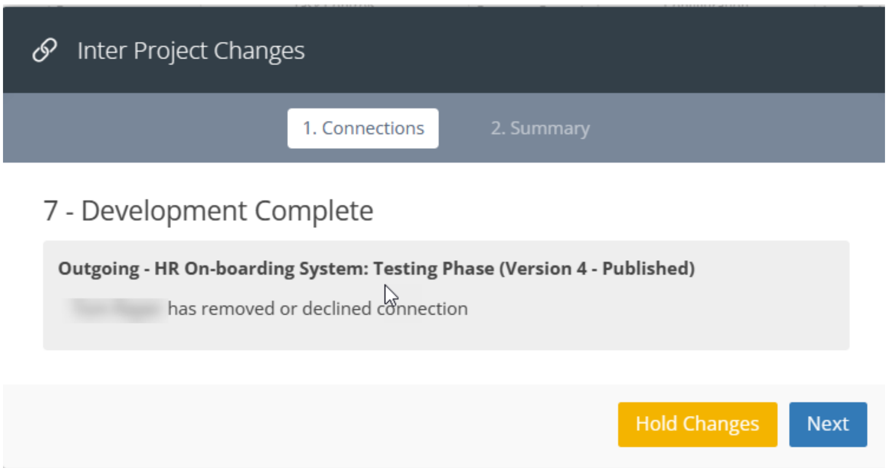


Figure 15: Notification when opening predecessor plan with a removed dependency.

If the user elects to Hold Changes on the removed dependency, they may continue to the plan review impact of the change and address or communicate desired change to the other plan owner. As noted by the summary message once the plan has been saved it will assume the deletion is accepted. Navigating away from the plan without saving will allow the user to continue to hold the removal as a pending change.

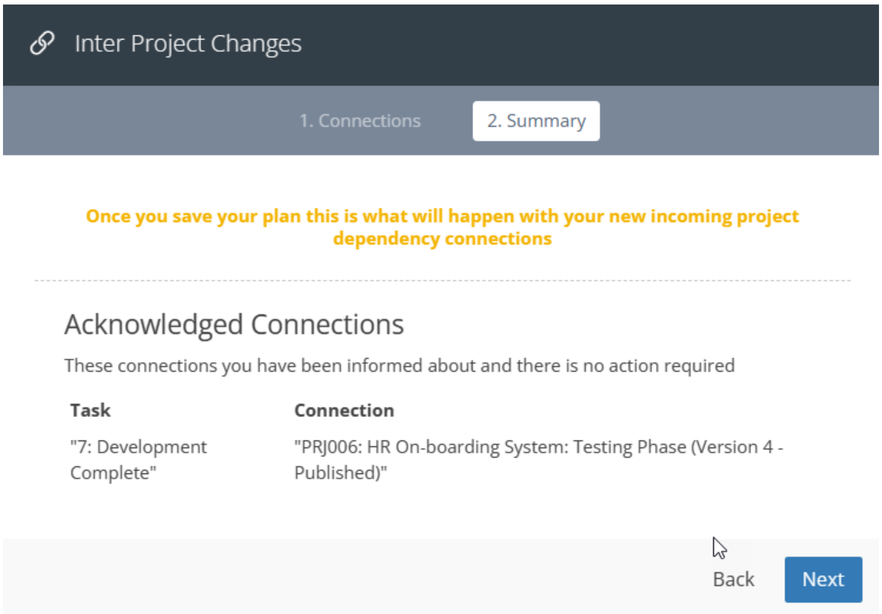


Figure 16: Sample summary when holding changes of removed dependency.

Dataview Changes for v8.01

A summary of Data View changes since the last major release (v8.0) can be found below.

New Dataviews

Dataview	Description
Enhanced Forecast Demand Dataview	This offers the same features as the existing Forecast Demand dataview but with the following additions: --Ability to report on demand, supply, and actuals at a demand line level --Ability to report on Resource and Role based demand lines --Ability to report on confirmed/provisional demand --Inclusion of demand line attributes such as Location, Deliverable --Inclusion of the demand line custom fields --Inclusion of the unique identifier field (Agency, Workflow status or Cost Centre) --Inclusion of Treatment Type field --Actuals will now be stored against demand details and will be populated by the Recalculate Strategic Plan actuals process. If a new forecast version is created, the user will need to manually recalculate actuals for that project after saving the Forecast, to report on the actuals
Enhanced Forecast Expenditure Dataview	This offers the same features as the existing Forecast Expenditure dataview but with the following additions: --Ability to report on expenditure and actuals at an expenditure line level --Ability to report on confirmed/provisional expenditure --Inclusion of expenditure line attributes such as Location, Deliverable --Inclusion of the expenditure line custom fields --Inclusion of the unique identifier field (Agency, Workflow status or Cost Centre) --Inclusion of Treatment Type field --Actuals will now be stored against expenditure details and will be populated by the Recalculate Strategic Plan actuals process. If a new forecast version is created, the user will need to manually recalculate actuals for that

	project after saving the Forecast, to report on the actuals

Updated Dataviews

Dataview	**New Fields**
TIMESHEET_GENERAL (Timesheet General Data)	Add General > Financial Treatment Type Add General > Unique Identifier Add Activity > Default Financial Treatment Type
TIMEEXPENSE_GENERAL (Time and Expense General Data)	Add General > Financial Treatment Type Add General > Unique Identifier Add Activity > Default Financial Treatment Type Add Expense Type > Default Financial Treatment Type
PROJECT_TIMESHEET_ACTUALS (Project TS Actuals)	Add in Treatment Type and Identifier to have separate entries for the Resource
EXPENSE_GENERAL (Expense General Data)	Add General > Financial Treatment Type Add General > Unique Identifier Add Expense Type > Default Financial Treatment Type
EXPENSTYPE_ADMIN (Expense Type Data)	Default Treatment Type in General section
PROFILE_SUMMARY (Forecast Summary Data)	Add "Confidence Level", "Start Date", "End Date", "Is Latest Baseline" fields to Forecast table

Data View changes are not applied automatically. Please contact your customer representative for installation guidance if required.